Twenty-five Dollars

C4325-1

Folio: SOURCE BOOK 1991

The comprehensive source of suppliers that specialize in serving the publishing industry.

Special tabbed editorial sections containing essential reference material for management, production and circulation executives.

EASY REFERENCE!

Supplier categories are listed in alphabetical order. Use the handy index right here on the cover

or

Find specific suppliers fast with the Quick Locator that starts on page 171.

Index

11 Ad Tracking
11 Advertising Agencies/Editorial Supplements
11 Advertising Agencies: Direct Mail and Promotion Specialists
12 Advertising Media: Direct Response Card Decks
14 Advertising Systems: Computerized In-House
14 Advertising Systems: Computerized On-Line/Remote
14 Air Freight National & International
14 Art & Design
16 Auditing Services

17 Bind-In Order Forms
17 Binding Services & Materials

17 Collection Services
17 Color Proofing Systems
17 Color Separations
25 Computer Data Processing Services
27 Computer Modeling
28 Consultants: Circulation
28 Consultants: Computer
28 Consultants: Management, Marketing and Editorial
31 Consultants: Production
31 Contracted Services
33 Credit Services

33 Data Entry/Data Conversion
33 Desktop Publishing: Software/Composition Systems
33 Desktop Publishing: Software/Display Ad Make-Up
33 Desktop Publishing: Software/Graphics/Graphic Processing
33 Desktop Publishing: Software/Page Make-Up
34 Desktop Publishing: Software/Text Processing
34 Desktop Publishing: Service Bureaus/Imaging Centers
34 Direct Mail Consultants, Agencies & Promotion Services
35 Direct Mail Lettershops & Suppliers
36 Directories: Specialized Services
37 Distribution: Alternate Sources
37 Distribution: Canadian Mail & Distribution Services
37 Distribution: International
40 Distribution: National

42 Editorial Services
42 Electronic Editing Systems & Pagination
44 Electronic Publishing/Pre-Press
44 Envelope Manufacturers
46 Executive Search & Recruitment

46 Financing
47 Freelance Writers
47 Fulfillment: Circulation
58 Fulfillment: Computerized In-House Circulation Systems
61 Fulfillment: Computerized On-Line/Remote Systems & Services
61 Fulfillment: Reader Service

62 Interactive Advertising

62 Laminators
64 Laser Printing
64 List Brokers
68 List Compilers
69 List Enhancement
69 List Maintenance
70 List Managers
78 List Owners
84 List Protection & Monitoring Services
84 List and File Maintenance Systems and Software

84 Mailing Lists
86 Management Systems: Computerized In-House
87 Media Kits/Rate Cards/Advertising Promotions
87 Mergers & Acquisitions Specialists
88 Microcomputer Publishing Systems or Software: Circulation
88 Microcomputer Publishing Systems or Software: Management, Marketing and Editorial
88 Microcomputer Publishing Systems or Software: Production

89 Organizations and Associations

91 Paper Manufacturers: Coated Stock
94 Paper Manufacturers: Supercalendered
95 Paper Manufacturers: Uncoated Stock
96 Paper Merchants
100 Personnel Agencies
100 Photo Houses: Stock
100 Plastic Wrapping/Bagging/Poly-Wrapping
101 Pre-Press Production Services
103 Printers (Manufacturers): Books
105 Printers: Commercial & Direct Mail
113 Printers: Direct Response Post Cards
114 Printers: Ink Jet
118 Printers: Inserts
119 Printers: Publication
150 Printers: Subscription & Reader Service Cards
150 Publishers' Representatives

155 Reprint Services
155 Research Companies

157 Subscription Agencies

158 Telephone Look-Up Services
158 Telephone Marketing Services: Inbound
159 Telephone Marketing Services: Outbound
162 Training
162 Translation Services
162 Typesetting Equipment & Systems
162 Typographers/Typesetting Services

Canadian Resources

165 Advertising Agencies: Direct Mail and Promotion Specialists
165 Consultants
165 Direct Mail Consultants, Agencies and Promotion Services
165 Direct Mail Lettershops and Suppliers
166 Distribution: Canadian Mail and Distribution Services
167 Distribution: International
167 Editorial Services
167 Fulfillment: Circulation
168 International Remail
168 List Compilers
168 Mailing Lists
168 Management Systems: Computerized In-House
168 Microcomputer Publishing Systems or Software: Circulation
169 Paper Merchants
169 Printers: Commercial and Direct Mail
169 Printers: Direct Response Post Cards
169 Printers: Publication
170 Printers: Subscription and Reader Service Cards
170 Research Companies
170 Telephone Marketing Services: Inbound
170 Telephone Marketing Services: Outbound
170 Transportation/Break-Up

Editor's page

The year ahead promises to be a challenging one for publishing

professionals: hikes in second-class postal rates; increasing fragmentation of the magazine marketplace; technological innovations in pre-press, printing and binding that alter the traditional ways that magazines have been produced and mailed; corporate mergers/aquisitions and restructurings that shift financial balance and market share—all compounded by what industry analysts see as a sluggish economic climate, at least through 1991.

To remain competitive, magazine professionals will have to keep up with the rapidly changing publishing environment. And that's why we have made a real effort this year to make the 1991 FOLIO: Sourcebook more of a hands-on resource than ever before. In addition to a comprehensive listing of suppliers in every area of publishing—from computerized in-house management systems to alternate distribution services to pre-press data transmission—we have included relevant information that will help you improve the day-to-day operation of your magazine.

For example, the Production Section contains pertinent articles on how to evaluate printers to select the one best suited to your publication's needs, ways to save money by auditing your printer's invoices, and guidelines from publishing pros who have made the transition to electronic publishing systems. There are also analyses of paper trends in demand, availability and pricing; examples of publishers who have changed their paper stock recently—and why—and projected consumption of coated and uncoated paper grades through the 1990s.

In the Circulation Section, there is an exhaustive analysis of circulation figures for more than 100 consumer magazines, combined with predictions for circulation strategies in the decade ahead. There is also advice from circulation experts on ways to find new magazine subscribers, strategies to boost mailing list response, tactics to give you the upper hand in list rental negotiation, ways to lift sagging direct mail rates cost-effectively with telemarketing, and a look at the exciting technological developments that are revolutionizing the fulfillment end of the business. An examination of the upcoming postal rate case—with detailed analyses of its impact on second-class mailing rates—is also included.

As a further helpful reference, the Industry Resources Section features a directory of magazine awards competitions that you can enter in 1991, a list of magazine launches last year—both business and consumer—and a complete editorial index to all articles published in FOLIO: and Publishing News in the past 18 months. Moreover, there are ad page totals and advertising revenue figures for the front-running magazines in each category, a five-year examination of across-the-board increases or decreases in ad page counts and revenue, and an advertising cost comparison of the top 50 revenue leaders.

In addition, each section contains in-depth salary surveys, which reflect trends in every publishing department—editorial, ad sales, circulation and production—to let you know where you and your magazine stand in relation to your publishing peers throughout the country.

In short, we have tried to put a wealth of relevant decision-making information at your fingertips—a timely compendium of suppliers specializing in every facet of publishing, and an editorial workbook of articles that will assist you in making your magazine run more smoothly and more profitably.

We hope you will reach for the FOLIO: Sourcebook often and that you will find it to be a valuable resource in handling the publishing challenges facing you in the coming year.

Lynn Hayes Bromfield

Lynn Hayes Bromfield
Editor

Editorial Table of contents

Production

Production salary survey 189

What impact have the recent technological changes in magazine production had on the salaries—and the job responsibilities—of production directors and managers? Find out by analyzing the results of FOLIO:'s annual production salary survey.

How to find the perfect printer 196
Evaluate the suitability of a printer's equipment for your particular job, and discover why one printer is a better match for your specific requirements than another. In addition, take a refresher course in web press capabilities.

Finding savings in your printer's invoice 200
All publishing professionals want to discover ways to save money in printing their magazines. Learn how a thorough and knowledgeable audit of your printer's invoice can lead to cost savings that don't compromise the quality of your magazine.

Experts predict paper trends 207
Even though most paper buyers and vendors expect stable paper prices to hold at least into 1991, there are other factors that affect the need:availability equation. Key experts offer their opinions on what will determine paper pricing and consumption in the decade ahead.

Coated paper outlook 211
Fluctuations in paper supply and price have a significant impact on a magazine's strategic planning. This analysis of the coated groundwood and free sheet supply/demand situation can serve as a guide to publishers in planning their paper needs for the coming year.

Uncoated paper outlook 219
Although coated papers are much more widely used by magazine publishers, uncoated paper grades will play a larger role in the future. Find out how continuing improvements in supercalendered papers will make it possible for some magazines to lower costs without sacrificing quality.

Evaluating your paper choices 225
A number of publications have made changes in their paper stock recently, and many more are considering doing so in the future. Discover what the reasoning is behind their decisions to change paper, and what effect the switch has had on their magazines.

Projected magazine paper demand 231
Compare projected growth rates for coated and uncoated paper grades through the 1990s and examine the effect that the increased availability of SC grades from U.S. and Canadian mills will have on respective market share positions in coming years.

Going electronic: Who controls the buying decision? 233
If you're considering buying an electronic publishing system, the advice of veterans who have made the transition can help you avoid some of the pitfalls they experienced—before you invest in costly hardware and software that doesn't fit your magazine's particular needs.

Circulation

Circulation salary survey 239

Get the rundown on salaries of circulation directors and managers in FOLIO:'s circulation salary survey, broken down by crucial factors that have a bearing on total compensation, such as the respondents' demographics and the size and nature of their publications.

Circulation wrap-up 247
This in-depth analysis of ABC-audited consumer magazines points to circulation trends in subscription and newsstand sales and highlights gainers/losers in circulation totals. Trends in cover price and rate base claims are also examined.

What's behind the newsstand dive? 259
The last few years have been tough on newsstand sales for the 400 or so magazines monitored by the Audit Bureau of Circulations. Find out why single copy sales have declined, and compare newsstand sales by magazine classification.

Publishers' billing series need improvements 262
Lack of innovation in billing packages can cause poor pay-up. Yet, many publishers neglect the look, wording and frequency of their billing mail, according to this survey. See why incorporating even a few simple improvements can have dramatic results.

Folio: SOURCE BOOK 1991

Original ways to find new subscribers 263
New subscribers are hard to find. And traditional promotion efforts are becoming less responsive. Understand how using your imagination can pay off not only in greater numbers of new subscriptions but also in higher renewal rates from well-targeted sources of readers.

A primer on mailing lists 267
In this broad overview, some basic observations about lists are examined. Guidelines are also offered on ways to use lists more effectively to maximize the profitability of your magazine, along with tips for smarter list selection and testing.

List rental negotiation is on the rise 272
Leaders in the list rental industry share timely ideas on how publishers can make sure they are getting the best deal when renting their subscriber list, and suggest some negotiating tactics that will give them the edge when renting lists themselves.

Telemarketing's larger role in circulation 276
Once used as a last-ditch effort to hold onto a subscriber, telemarketing today is playing an increasingly important part in publishers' renewal strategies. Explore new methods of using telemarketing effectively, both in terms of response rates and cost-per-order.

What's on the fulfillment horizon? 280
The way that information on subscribers is collected, managed and marketed has a definite impact on your magazine's bottom line. Discover why the growing sophistication in database manipulation is revolutionizing the fulfillment end of magazine publishing.

Who gets hurt the most by the new postal rates? 295
The real story is not the rate increase, but how publishers plan to counter the hikes in postage by changing the way they do business. Gain valuable insight into what some magazine publishers are doing to soften the most recent blow by the U.S. Postal Service.

An inside look at postal rate making 306
Who are the players in shaping new postal rates? And how does the procedure really work? Find out in this examination of postal rate making—the opposing factions, the negotiating process and the bureaucratic complications that result in the rates you will have to pay.

Industry Resources

Editorial salary survey 313

Although individual talent is the most important determinant of editorial salary, other factors—ones that can be measured—also contribute to pay levels. See how your magazine compares with other publications throughout the country in FOLIO:'s yearly editorial salary survey.

Ad sales compensation survey 322
This annual survey of the salaries and bonuses of advertising sales professionals yields some conclusions about the overall compensation picture, as well as specifics that significantly influence the total pay levels of ad directors, managers and sales people.

Ad page/ad revenue picture 334
The leaders in advertising pages and revenue, along with five-year analyses of increases/decreases in ad pages and dollars, reveal the relative health of consumer magazines in general, while a look at ad revenue by class totals shows which ad classifications have been experiencing the most dramatic revenue swings.

New magazines: 1989 337
Both existing publishing companies and entrepreneurs launched a wide variety of magazines in 1989—both business and consumer. FOLIO: showcases this diverse group of start-ups and describes each publication's target audience and circulation.

Directory of magazine awards 346
Recognition by your peers is perhaps the greatest honor for any dedicated publishing professional. Find out which competitions your magazine is eligible to enter and what awards are given to the winners in each contest.

Editorial index 353
If you've ever wondered if FOLIO: has recently published an article on, say, international publishing, designing logos or bringing fulfillment in-house, this 18-month editorial index—covering FOLIO: and Publishing News—will make locating whatever information you need as simple as possible.

Projected magazine paper demand

Magazine demand for paper by grades

(000 short tons)

	Total	Total Coated	Nos. 1&2	No.3	No.4	No.5	Unc. Gwd.	SC Gwd.	Other
1978	2,442	2,005	15	55	298	1,637	317	30	287
1979	2,407	1,931	11	70	323	1,527	382	52	330
1980	2,459	2,010	9	55	345	1,601	369	59	310
1981	2,525	1,990	12	62	341	1,575	390	70	320
1982	2,515	2,041	12	63	348	1,618	365	80	285
1983	2,925	2,373	13	81	380	1,898	447	139	308
1984	3,223	2,593	13	93	403	2,083	527	190	337
1985	3,028	2,511	8	90	361	1,981	526	200	326
1986	3,098	2,678	11	116	415	2,000	525	199	326
1987	3,348	2,723	21	119	520	2,070	561	228	333
1988	3,494	2,797	12	126	553	2,138	620	277	343
1989	3,559	2,960	8	131	554	2,164	629	284	345
1990	3,646	3,036	9	133	566	2,198	624	280	344
1991	3,818	3,011	10	140	599	2,298	654	305	349
1992	3,964	3,079	12	145	625	2,378	682	327	355
1993	4,095	3,147	11	153	648	2,450	707	348	359
1994	4,226	3,263	12	158	672	2,522	732	368	364
1995	4,351	3,309	13	163	695	2,591	756	388	368
1996	4,491	3,570	14	169	720	2,667	782	409	373
1997	4,620	3,671	14	175	743	2,739	806	429	377
1998	4,758	3,778	15	181	768	2,814	832	450	382

Over the decade ahead, growth rates for higher quality coated grades used in magazines—Nos. 3 and 4—will exceed that of No. 5 grades. It is projected that No. 3 will increase 3.7 percent annually, No. 4 will rise by 3.3 percent, and No. 5 by 2.8 percent. Supercalendered use by magazines will grow 5.0 percent annually during the same period. Coated No. 3 will show an increase in market share from 3.6 percent in 1990 to 3.8 percent in 1998; No. 4 will go from a 15.5 percent market share to 16.1 percent; and No. 5 will drop slightly from a 60.3 percent market share to 59.1 percent. Coated papers overall will decrease market share from 83.3 percent in 1990 to 79.4 percent in 1998. The increased availability of SC grades from both U.S. and Canadian mills should result in SC increasing its market share from 7.7 percent in 1990 to approximately 9.5 percent in 1998.

Source: Forecaster Printing/Writing Papers—1989-1998, Miller Freeman Publications Inc.

Consumption of paper grades in magazines

Percent of total demand

	Uncoated Groundwood*	Coated Paper	Uncoated Free Sheet	News-print
1972	13.2%	82.8%	0.6%	3.5%
1977	15.3	80.7	0.3	3.9
1982	14.5	82.0	0.2	3.2
1987	16.8	80.0	1.6	1.9
1992	17.2	79.7	1.3	1.8
1997	17.5	79.5	1.7	1.4

* Mainly SC grades

While coated papers are expected to show a slight loss in market share, and newsprint will also lose share, uncoated groundwood—mainly SC papers—should experience an increase in market share by the end of the decade, mainly at the expense of machine-finished grades.

Source: Forecaster Printing/Writing Papers—1989-1998, Miller Freeman Publications Inc.

Change in demand for magazine and periodical paper

(000 short tons)

Grade	1978	1988	1998	Change 1979-88	Change 1989-98
Coated	2,005	2,830	3,779	825	949
No. 5	1,637	2,138	2,814	501	676
No. 4	298	553	768	255	215
No. 3	55	126	181	71	55
Nos. 1 & 2	15	12	15	-3	3
Uncoated Groundwood	317	620	832	303	212
SC	30	277	450	247	173
Other	287	343	382	56	39
Total*	2,323	3,47 5	4,694	1,152	1,219

* Includes a small amount of uncoated free sheet

Total demand for paper used in magazines will reach 4.7 million tons in 1998, compared to 3.5 million tons in 1988—an increase of 1.22 million tons. Coated papers will continue to be the major grade used in magazines, accounting for about 80 percent, but uncoated supercalendered groundwood paper will increase its market share.

Source: Forecaster Printing/Writing Papers—1989-1998, Miller Freeman Publications Inc.

Circulation wrap-up

Total circulations

Almost 40 percent of ABC members reported circulation losses for 1989, which is the worst showing since 1986, according to Capell's Circulation Report (CCR). Approximately half reported decreases in newsstand sales, with some of the traditionally big newsstand sellers experiencing sharp declines—*Woman's Day* and *Family Circle*, for example, lost a combined 1.4 million sales per issue. And although 63 percent of ABC members indicated subscription gains, this still was not enough to offset newsstand losses for many magazines.

The categories with the highest percentage losses in circulation were computer, motorcycle, outdoor and news magazines, along with the seven sisters and tabloids. Categories that performed well overall were comics, fitness and health, business/finance, and affluent magazines, as well as city-regionals and thoughtleaders. For the decade ahead, consultant E. Daniel Capell, editor of CCR, sees fitness and health and business/finance continuing as hot categories, joined by spectator sport magazines. Cool categories for the 1990s, he says, will be computer, automotive and women's service books.

continued on page 250

Greatest percentage increases in total circulation

Magazine	% Increase			Total Circ.	
	Total Circ.	Sub. Circ.	Single Copy Circ.	12/89	12/88
Velonews	66.3	40.7	149.0	23,193	13,948
Incider	63.9	86.9	-19.4	191,910	117,081
Honolulu	58.9	63.0	16.7	55,237	34,756
WOW! Magazine	51.9	—	48.1	138,843	91,402
PC/Computing	50.9	65.0	-1.8	471,642	312,625
Rhode Island Monthly	50.5	57.8	19.5	26,382	17,526
Mountain Bike	48.0	77.4	28.2	54,796	37,038
Financial World	45.7	46.3	4.8	442,042	303,316
Utne Reader	39.8	35.5	69.0	152,275	108,949
Star Comics	39.3	59.0	38.2	463,402	332,600
Lear's	37.6	66.0	-32.2	452,723	328,975
Bop	36.9	-8.0	43.2	270,730	197,733
Parenting Magazine	35.6	37.4	21.6	489,109	360,649
Truckin'	35.1	14.6	39.5	179,223	132,651
Vantage	34.9	34.9	—	292,513	216,806
The Wine Spectator	34.9	32.0	48.6	85,620	63,490
Minneapolis St. Paul Magazine	34.8	41.8	15.3	62,151	46,106
Automobile Magazine	31.4	37.3	19.3	401,676	305,652
Writer's Digest	29.2	32.8	3.1	268,991	208,283
WWF Magazine	29.1	29.3	29.0	341,977	264,957
Spy	28.6	35.9	22.1	132,760	103,223
Horse & Rider	28.1	34.6	4.0	106,151	82,893
Popular Photography	27.6	31.2	-4.6	927,388	726,572
The Walking Magazine	26.9	33.7	-15.5	420,630	331,481
Premiere	26.6	44.0	8.3	440,472	348,040
TV Picture Life/Metal Edge	26.5	—	26.5	200,369	158,436
Manhattan, Inc.	26.3	35.3	-32.9	113,679	90,044
Changing Times	24.9	25.8	.2	1,300,153	1,040,677
European Travel & Life	24.9	26.6	15.9	360,103	288,342
Florida Home & Garden	24.2	29.6	-8.5	48,818	39,318

Although more than one third of these publications had single-copy sales increases of less than 10 percent—and of the 30 titles, over 20 percent indicated losses in newsstand sales—strong subscription sales resulted in substantial percentage gains in their overall circulation figures.

Source: ABC audit figures for six months ended 12/89

Magazines with greatest percentage losses in total circulation

Fragmentation of the marketplace—with many titles competing for readers in the same category, particularly on the newsstand—caused the decline of circulation levels for several of the 30 magazines with the greatest percentage decreases in total circulation. This is reflected by their average drop in subscription sales of 10.5 percent, and a 16.5 percent average decrease in single copy sales.

Source: ABC audit figures for six months ended 12/89

Magazine	% Decrease			Total Circ.	
	Total	Subs	Single Copy	12/89	12/88
Horseman	-56.6	-55.0	-92.3	60,071	138,476
BMX Plus!	-29.9	-21.7	-35.1	54,585	77,834
Compute!'s Gazette	-26.1	-32.4	-10.0	128,929	174,476
Cheri	-23.9	—	-23.9	139,676	183,513
Bassin'	-23.5	-33.6	+46.5	174,905	228,508
National Examiner	-20.2	+2.2	-20.6	893,956	1120,434
Rider	-20.2	-20.7	-15.7	105,709	132,466
Micro Cornucopia	-19.5	-9.1	-28.7	17,642	21,922
Transworld Skateboarding	-19.5	-28.3	-17.5	134,919	167,652
Baseball Digest	-17.8	-18.4	-7.6	263,731	320,711
Woman's Day	-15.6	-12.9	-15.6	4705,288	5571,573
Football Digest	-15.2	-16.2	+3.8	167,800	197,752
Weekly World News	-14.3	-17.5	-14.1	848,767	990,177
Home Office Computing	-13.6	-14.2	-6.6	375,547	434,565
Satellite Orbit	-13.3	-20.7	-1.6	315,463	363,848
Penthouse	-13.2	+30.4	-18.7	1830,823	2108,256
Globe	-12.9	+.8	-13.4	1329,413	1525,745
Dirt Wheels	-12.8	-13.0	-12.7	66,784	76,604
Grit	-11.4	-11.0	-16.1	460,877	520,019
Arkansas Times Magazine	-11.3	-11.4	-10.3	28,505	32,125
Working Mother	-11.2	-11.7	+13.5	538,072	605,951
Travel-Holiday	-10.8	+40.6	-97.3	673,501	755,104
TV Crosswords	-10.6	-22.6	-3.0	302,128	337,907
Cycle World	-9.4	-11.4	-3.7	245,929	271,435
Mademoiselle	-9.4	+30.7	-24.6	1162,206	1283,242
Washington, The Evergreen State Magazine	-9.4	-4.5	-37.1	63,508	70,111
Milwaukee Magazine	-8.8	-8.2	-11.9	36,850	40,419
American Legion Auxiliary National News	-8.2	-8.2	—	736,321	801,733
Daytime TV	-8.2	—	-8.2	106,238	115,757
Family Circle	-7.8	+5.0	-12.3	5461,786	5922,530

Circulation numbers alone don't tell the whole story of a magazine's viability in today's marketplace. For a look at gainers/losers in ad pages and advertising revenue, see pages 334 and 335 in the Industry Resources section.

Top 100 magazines by total circulation

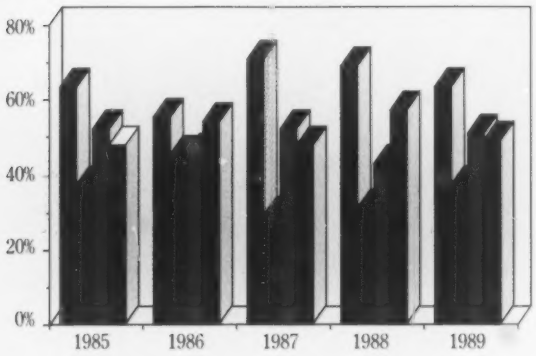
Title	1989 Circ.	1988 Circ.	% Change
Modern Maturity	21,430,990	19,301,820	+11.0
Reader's Digest	16,343,599	16,452,422	- 0.7
TV Guide	15,867,750	16,302,705	- 2.7
National Geographic	10,890,660	10,574,562	+ 3.0
Better Homes and Gardens	8,005,311	8,143,083	- 1.7
Family Circle	5,461,786	5,922,530	- 7.8
Good Housekeeping	5,152,245	5,217,147	- 1.2
McCall's	5,088,686	5,142,463	- 1.1
Ladies' Home Journal	5,038,297	5,086,714	- 1.0
Woman's Day	4,705,288	5,571,573	-15.6
Time	4,339,029	4,648,454	- 6.7
Guideposts	4,203,934	4,258,806	- 1.3
National Enquirer	4,100,740	4,285,707	- 4.3
Redbook	3,901,419	3,950,489	- 1.2
Star	3,588,753	3,682,796	- 2.6
First For Women	3,509,688	3,684,536	- 4.8
Sports Illustrated	3,424,393	3,329,415	+ 2.9
Playboy	3,421,203	3,555,663	- 3.8
People Weekly	3,270,835	3,349,401	- 2.4
Newsweek	3,180,011	3,227,391	- 1.5
Prevention	3,134,914	3,136,447	- 0.1
The American Legion Magazine	2,828,238	2,824,260	+ 0.1
Cosmopolitan	2,702,125	2,760,010	- 2.1
Smithsonian	2,342,443	2,262,015	+ 3.6
Southern Living	2,318,841	2,288,695	+ 1.3
Glamour	2,224,135	2,190,027	+ 1.6
U.S. News & World Report	2,209,996	2,300,197	- 3.9
Field & Stream	2,015,577	2,032,020	- 0.8
V.F.W. Magazine	1,979,899	1,955,052	+ 1.3
NEA Today	1,919,340	1,849,186	+ 3.8
Money	1,834,618	1,821,625	+ 0.7
Penthouse	1,830,823	2,108,256	-13.2
Popular Science	1,818,403	1,844,323	- 1.4
Country Living	1,801,414	1,833,816	- 1.8
Ebony	1,791,976	1,764,993	+ 1.5
Home & Away	1,791,728	1,741,552	+ 2.9
Seventeen	1,766,161	1,752,308	+ 0.8
Parents Magazine	1,752,697	1,772,633	- 1.1
Life	1,749,723	1,749,972	- 0.0
Popular Mechanics	1,650,693	1,668,096	- 1.0
Discovery	1,607,574	1,619,701	- 0.8
1,001 Home Ideas	1,603,099	1,536,706	+ 4.3
Woman's World	1,560,496	1,413,575	+10.4
Outdoor Life	1,507,529	1,514,400	- 0.5
The Elks Magazine	1,501,652	1,526,010	- 1.6
Adventure Road	1,479,616	1,484,100	- 0.3
The American Rifleman	1,442,317	1,358,967	+ 6.1
Sunset	1,393,015	1,430,860	- 2.6
New Woman	1,390,830	1,332,586	+ 4.4
The American Hunter	1,380,230	1,359,307	+ 1.5
US	1,365,892	1,379,602	- 1.0

Title	1989 Circ.	1988 Circ.	% Change
Golf Digest	1,363,907	1,314,434	+ 3.8
Boys' Life	1,334,659	1,392,535	- 4.2
Globe	1,329,413	1,525,745	-12.9
Changing Times	1,300,153	1,040,677	+24.9
The Workbasket	1,295,578	1,402,785	- 7.6
Vogue	1,247,920	1,202,471	+ 3.8
Sesame Street Magazine	1,235,842	1,260,274	- 1.9
Rolling Stone	1,216,781	1,273,681	- 4.5
Self	1,213,314	1,229,791	- 1.3
Home Mechanix	1,209,395	1,229,727	- 1.7
Mademoiselle	1,162,206	1,283,242	- 9.4
Travel & Leisure	1,115,328	1,125,788	- 0.9
Teen	1,100,237	1,093,051	+ 0.7
Health	1,088,696	1,026,164	+ 6.1
Discover	1,053,034	1,030,228	+ 2.2
Organic Gardening	1,037,214	1,086,406	- 4.5
Golf Magazine	1,019,379	937,232	+ 8.8
Weight Watchers Magazine	1,007,755	1,003,347	+ 0.4
Yankee	1,002,781	1,003,948	- 0.1
American Health: Fitness of Body and Mind	1,000,689	981,626	+ 1.9
Business Week (Worldwide)	992,820	975,585	+ 1.8
YM	967,249	887,571	+ 9.0
Country Home	963,081	972,178	- 0.9
Sport	960,066	947,005	+ 1.4
Scouting	949,405	1,009,086	- 5.9
House Beautiful	939,735	890,745	+ 5.5
Car and Driver	934,377	935,315	- 0.1
Popular Photography	927,388	726,572	+27.6
Omni	925,436	925,345	+ 0.0
Home Magazine	925,335	—	—
Hot Rod	911,667	884,669	+ 3.1
Workbench	909,119	845,673	+ 7.5
National Examiner	893,956	1,120,434	-20.2
Business Week (North America)	889,535	879,334	+ 1.2
Psychology Today	887,770	931,859	- 4.7
Jet	860,671	852,913	+ 0.9
Nation's Business	858,228	855,424	+ 0.3
Essence	851,034	850,007	+ 0.1
Weekly World News	848,767	990,177	-14.3
Elle	826,336	826,877	- 0.1
Food & Wine	823,530	798,366	+ 3.2
Motor Trend	818,021	784,919	+ 4.2
Consumers Digest	813,373	759,714	+ 7.1
Gourmet	807,377	806,304	+ 0.1
Victoria	793,790	683,104	+16.2
Homeowner	791,310	724,017	+ 9.3
Fortune (Worldwide)	781,040	769,947	+ 1.4
Practical Homeowner	759,857	719,730	+ 5.6
Forbes	743,533	741,731	+ 0.2

The only change in the order of the top 10 ABC-audited consumer magazines from the same period last year is Woman's Day's drop from seventh position to tenth. Modern Maturity posted a dramatic 2 million-plus gain in circulation; National Geographic reported a modest increase over 1988, while the rest of the leading 10 titles actually showed slight declines in total circulation.

Source: ABC audit figures for six monthes 12/89

Five-year circulation summary for ABC members



A quick glance at this chart reveals little substantial change in the percentages of gainers and losers since 1985. This does not tell the whole story, however, since the volume of newsstand losses in sales per issue, particularly for some of the big sellers, has taken its toll on total circulation figures, which is not reflected in a simple tabulation by percentages of magazines gaining/losing circulation.

Source: Capell's Circulation Report

Circulation wrap-up
continued from page 247

Declining single copy sales

Unquestionably, the primary trend in the 1980s was the decline of newsstand sales, according to Capell. For ABC members, sagging single copy sales will continue to be a crucial issue in the 1990s.

In the last decade, the newsstand component of ABC members' total circulation was down 30 percent. By the year 2000, predicts Capell, newsstand circulation will represent less than 20 percent of the total mix. Cable television and VCRs, now in approximately 60 percent of U.S. homes, have contributed to the decline in newsstand sales. Consumers are spending less time reading and more time in front of the TV, resulting in fewer shopping trips overall and fewer impulse purchases of magazines.

continued on page 252

Comparison of 1989 top 20 magazines

Magazine	1989 Circ.	% Inc./Dec.	1988 Circ.	% Inc./Dec.	1987 Circ.	% Inc./Dec.	1986 Circ.
Modern Maturity	21,430,990	+11.0	19,301,820	+15.3	16,734,801	—	—
Subscription	21,430,990	+11.0	19,301,820	+15.3	16,734,801	—	—
Single Copy	—	—	—	—	—	—	—
Reader's Digest	16,343,599	- 0.7	16,452,422	- 0.7	16,566,650	- 0.3	16,609,847
Subscription	15,419,265	- 0.4	15,486,755	- 1.0	15,636,050	- 0.3	15,677,720
Single Copy	924,334	- 4.3	965,667	+ 3.8	930,600	- 0.2	932,127
TV Guide	15,867,750	- 2.7	16,302,705	- 3.9	16,969,260	+ 1.0	16,800,441
Subscription	8,641,201	- 2.1	8,827,705	- 0.1	8,832,670	+ 6.2	8,318,195
Single Copy	7,226,549	- 3.3	7,475,000	- 8.1	8,136,590	- 4.1	8,482,246
National Geographic	10,890,660	+ 3.0	10,574,562	+ 0.7	10,498,594	- 2.5	10,764,998
Subscription	10,803,286	+ 2.8	10,510,570	+ 0.7	10,439,527	- 2.4	10,693,356
Single Copy	87,374	+36.5	63,992	+ 8.3	59,067	-17.6	71,642
Better Homes and Gardens	8,005,311	- 1.7	8,143,083	+ 1.6	8,012,659	- 1.0	8,091,751
Subscription	7,429,478	- 0.9	7,496,750	+ 1.4	7,392,159	- 1.7	7,520,584
Single Copy	575,833	-10.9	646,333	+ 4.2	620,500	+ 8.6	571,167
Family Circle	5,461,786	- 7.8	5,922,530	+ 2.6	5,773,484	7.8	6,261,519
Subscription	1,623,695	+ 5.0	1,545,872	+34.8	1,146,591	+100.0	573,419
Single Copy	3,838,091	-12.3	4,376,658	- 5.4	4,626,893	-18.7	5,688,100

continued on next page

Comparison of 1989 top 20 magazines *page 2*

Magazine	1989 Circ.	% Inc./Dec.	1988 Circ.	% Inc./Dec.	1987 Circ.	% Inc./Dec.	1986 Circ.
Good Housekeeping	5,152,245	- 1.2	5,217,147	+ 0.3	5,202,526	- 0.4	5,221,575
Subscription	3,640,720	+ 1.0	3,603,201	+ 2.3	3,521,736	+ 1.6	3,466,047
Single Copy	1,511,525	- 6.4	1,613,946	- 4.0	1,680,790	- 4.3	1,755,528
McCall's	5,088,686	- 1.1	5,142,463	- 3.9	5,353,595	+ 3.2	5,186,393
Subscription	4,488,066	+ 2.5	4,379,331	- 4.6	4,590,558	+ 3.0	4,456,238
Single Copy	600,620	-21.3	763,132	+ 0.0	763,037	+ 4.5	730,155
Ladies' Home Journal	5,038,297	- 1.0	5,086,714	- 0.7	5,125,052	+ 2.1	5,020,551
Subscription	4,070,185	- 0.1	4,074,562	- 0.3	4,086,417	+ 1.8	4,013,405
Single Copy	968,112	- 4.4	1,012,152	- 2.5	1,038,635	+ 3.1	1,007,146
Woman's Day	4,705,288	-15.6	5,571,573	- 7.5	6,021,136	+ 4.8	5,743,842
Subscription	107,288	-12.9	123,131	+25.5	98,143	+37.7	71,264
Single Copy	4,598,000	-15.6	5,448,442	- 8.0	5,922,993	+ 4.4	5,672,578
Time	4,339,029	- 6.7	4,648,454	- 0.7	4,683,348	- 0.8	4,720,159
Subscription	4,120,748	- 6.7	4,416,189	- 0.5	4,439,485	- 1.3	4,499,136
Single Copy	218,281	- 6.0	232,265	- 4.8	243,863	+10.3	221,023
Guideposts	4,203,934	- 1.3	4,258,806	- 0.7	4,290,882	+ 0.7	4,260,697
Subscription	4,203,934	- 1.3	4,258,806	- 0.7	4,290,882	+ 0.7	4,260,697
Single Copy	—	—	—	—	—	—	—
National Enquirer	4,100,740	- 4.3	4,285,707	- 2.2	4,383,227	+ 0.0	4,381,242
Subscription	437,244	- 4.0	455,612	+ 2.7	443,566	+ 1.6	436,746
Single Copy	3,663,496	- 4.4	3,830,095	- 2.8	3,939,661	- 0.1	3,944,496
Redbook	3,901,419	- 1.2	3,950,489	- 3.4	4,088,739	+ 2.0	4,009,450
Subscription	3,147,372	+ 0.2	3,142,469	- 2.1	3,208,442	- 0.8	3,235,214
Single Copy	754,047	- 6.7	808,020	- 8.2	880,297	+13.7	774,236
Star	3,588,753	- 2.6	3,682,796	- 2.3	3,770,303	+ 1.7	3,706,131
Subscription	443,739	+ 3.7	427,808	- 7.1	460,304	+49.9	307,004
Single Copy	3,145,014	- 3.4	3,254,988	- 1.7	3,309,999	- 2.6	3,399,127
First For Women	3,509,688	- 4.8	3,684,536	—	—	—	—
Subscription	—	—	—	—	—	—	—
Single Copy	3,509,688	- 4.8	3,684,536	—	—	—	—
Sports Illustrated	3,424,393	+ 2.9	3,329,415	+ 5.6	3,154,018	+ 8.9	2,895,116
Subscription	3,302,664	+ 3.1	3,203,887	+ 5.7	3,032,486	+ 9.3	2,775,643
Single Copy	121,729	- 3.0	125,528	+ 3.3	121,532	+ 1.7	119,473
Playboy	3,421,203	- 3.8	3,555,663	- 4.7	3,732,948	+ 7.4	3,477,324
Subscription	2,527,432	- 6.1	2,690,965	+11.4	2,415,917	- 3.3	2,498,140
Single Copy	893,771	+ 3.4	864,698	-34.3	1,317,031	+34.5	979,184
People Weekly	3,270,835	- 2.4	3,349,401	+ 1.1	3,311,793	+ 9.0	3,038,363
Subscription	1,521,490	+ 2.7	1,481,357	+ 4.5	1,418,170	+ 9.3	1,297,806
Single Copy	1,749,345	- 6.4	1,868,044	- 1.4	1,893,623	+ 8.8	1,740,557
Newsweek	3,180,011	- 1.5	3,227,391	+ 0.9	3,198,007	+ 3.1	3,101,152
Subscription	3,006,589	- 1.2	3,041,795	+ 1.0	3,012,472	+ 3.3	2,916,933
Single Copy	173,422	- 6.6	185,596	+ 0.0	185,535	+ 0.7	184,219

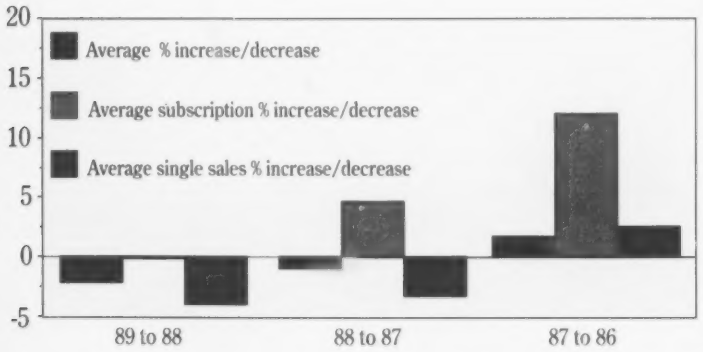
End of chart. Caption follows on next page.

Chart, caption,
continued from previous page

Seventeen of the magazines with highest circulation totals for 1989 were down in overall circulation from 1988, compared with 11 that decreased their total circulation levels in 1988, and six in 1987. Half of these titles suffered decreases in subscription sales in '89; eight lost subscribers the year before, and six in 1987 had lowered subscription sales. Only two of the leading circulation magazines had improved single copy sales in 1989. In 1988, six showed higher newsstand totals over the previous audit period, and 10 increased their single copy sales in 1987.

Source: ABC audit figures for six months ended 12/89, 12/88, 12/87, 12/86

Three-year circulation analysis of top 20 consumer magazines



A quick look at the above chart paints a rather bleak picture. But, according to industry experts, it is not as bleak as it first looks, even though the top 20 ABC-audited consumer magazines have been hit hard on the newsstands and have also started to slip in subscription sales. Large circulation magazines, they say, are trimming their circulation levels in order to penetrate their particular markets more cost-effectively. This "spending smarter" philosophy will result in healthier total circulation files, with more renewals as a percentage of subscription sales. Better targeting of subscribers in the 1990s, then, is expected to offset the steady decline of newsstand sales.

Source: ABC audit figures for six months ended 12/89

Circulation wrap-up
continued from page 250

Subscription sales

To counter the downward trend in single copy sales, publishers will have to develop more finely tuned strategies to increase subscription sales, Capell says. One strategy for the 90s will be to lengthen the subscription term. Eventually, Capell foresees that subscription sales will more than make up for newsstand losses.

Another strategy in the decade ahead, according to Capell, will be an increase in telemarketing subscription promotions. Although most circulation directors have been using telemarketing regularly for renewals, new business telemarketing will be as important to generating new subscriptions as direct mail was in the 1980s, he says.

The key words for the 1990s, according to consultant David H. Foster, editor of Competitive Publishing Hotline (CPH), are segmentation and targeting. The philosophy of five years ago—"Let's get as much circulation as we possibly can"—has been replaced with a more sophisticated approach: defining the specific audience for whom the magazine is written, then selectively reaching that particular group of readers.

Another perspective: Non-ABC-audited titles gain in newsstand sales

The rather bleak newsstand picture painted by ABC figures does not tell the whole story, according to a report released by the Periodicals Institute, Inc. (PII). Too much credibility is placed on ABC-only numbers, argues PII, and not enough attention is

continued on page 256

Magazines with highest subscription sales

Title	1989 Sub Sales	1988 Sub Sales	Percent Change
Modern Maturity	21,430,990	19,301,820	+11.0
Reader's Digest	15,419,265	15,486,755	- 0.4
National Geographic	10,803,286	10,510,570	+ 2.8
TV Guide	8,641,201	8,827,705	- 2.1
Better Homes and Gardens	7,429,478	7,496,750	- 0.9
McCall's	4,488,066	4,379,331	+ 2.5
Guideposts	4,203,934	4,258,806	- 1.3
Time	4,120,748	4,416,189	- 6.7
Ladies' Home Journal	4,070,185	4,074,562	- 0.1
Good Housekeeping	3,640,720	3,603,201	+ 1.0
Sports Illustrated	3,302,664	3,203,887	+ 3.1
Redbook	3,147,372	3,142,469	+ 0.2
Newsweek	3,006,589	3,041,795	- 1.2
The American Legion Magazine	2,828,238	2,824,260	+ 0.1
Prevention	2,783,164	2,812,828	- 1.1
Playboy	2,527,432	2,690,965	- 6.1
Smithsonian	2,328,261	2,250,174	+ 3.5
U.S. News & World Report	2,139,188	2,235,186	- 4.3
Southern Living	2,119,254	2,097,730	+ 1.0
V.F.W. Magazine	1,979,899	1,955,052	+ 1.3
NEA Today	1,919,340	1,849,186	+ 3.8
Field & Stream	1,917,077	1,931,929	- 0.8
Home & Away	1,791,728	1,741,552	+ 2.9
Family Circle	1,623,695	1,545,872	+ 5.0
Parents Magazine	1,610,166	1,642,621	- 2.0
Discovery	1,607,574	1,619,701	- 0.8
Popular Science	1,598,736	1,606,276	- 0.5
1,001 Home Ideas	1,552,403	1,492,663	+ 4.0
Money	1,549,891	1,534,156	+ 1.0
Ebony	1,534,839	1,519,475	+ 1.0

As in the first half of 1989, Modern Maturity (which has no newsstand distribution) heads the list of magazines with highest subscription sales for the ABC July-December audit period, increasing 11 percent over the comparable period in 1988. Generally, it was an almost even split between gainers and losers—16 with higher 1989 subscription sales and 14 with lower—with an average 0.53 percent increase among the top 30 titles.

Source: ABC audit figures for six months ended 12/89

Magazines with greatest percentage increases in subscription sales

Magazine	Percent Increase	12/89 Subs	12/88 Subs
Woman	658.6	62,360	8,221
Incider	86.9	171,505	91,754
Mountain Bike	77.4	26,373	14,867
Lear's	66.0	388,223	233,816
PC/Computing	65.0	406,604	246,375
Honolulu	63.0	51,694	31,719
Star Comics	59.0	28,527	17,939
Rhode Island Monthly	57.8	22,409	14,202
Financial World	46.3	438,073	299,528
Victoria	44.3	552,082	382,504
Premiere	44.0	256,411	178,050
Men's Fitness	42.8	57,181	40,042
Minneapolis St. Paul Magazine	41.8	48,151	33,959
Mountain Bike Action	41.2	10,203	7,227
Velonews	40.7	14,978	10,649
Travel-Holiday	40.6	665,743	473,476
CD Review	37.7	75,386	54,747
Parenting Magazine	37.4	439,405	319,760
Automobile Magazine	37.3	281,903	205,293
Spy	35.9	66,246	48,756
Utne Reader	35.5	128,575	94,922
Manhattan, Inc.	35.3	105,682	78,125
Vantage	34.9	292,513	216,806
Horse & Rider	34.6	87,725	65,177
The Walking Magazine	33.7	381,688	285,389
Colorado Homes & Lifestyles	33.6	12,960	9,698
Writer's Digest	32.8	242,793	182,881
The Wine Spectator	32.0	69,174	52,422
Details	31.7	52,707	40,037
Popular Photography	31.2	858,054	653,905

An examination of the magazines with the 30 highest percentage increases in subscription sales indicates, generally, that those publishers who have targeted a specific market niche have had the most significant gains in 1989, with more than one quarter of the 30 leading titles reporting greater than 50 percent jumps in their subscription circulations.

Source: ABC audit figures for six months ended 12/89

Magazines with greatest percentage decreases in subscription sales

Magazine	Percent Decrease	12/89 Total	12/88 Total
Horseman	-55.0	59,606	132,409
Off-Road	-34.7	18,061	27,659
Bassin'	-33.6	132,472	199,541
Compute!'s Gazette	-32.4	84,683	125,314
Transworld Skateboarding	-28.3	22,353	31,171
TV Crosswords	-22.6	101,428	131,018
BMX Plus!	-21.7	23,853	30,479
Teen Beat	-21.2	49,022	62,214
Rider	-20.7	94,876	119,615
Satellite Orbit	-20.7	176,501	222,590
Baseball Digest	-18.4	246,349	301,901
Weekly World News	-17.5	34,293	41,547
Modern Bride	-16.8	25,169	30,238
Football Digest	-16.2	157,220	187,562
Home Office Computing	-14.2	341,997	398,634
Dirt Wheels	-13.0	21,213	24,380
Woman's Day	-12.9	107,288	123,131
Working Mother	-11.7	523,453	593,072
Arkansas Times Magazine	-11.4	25,800	29,110
Cycle World	-11.4	177,595	200,485
Grit	-11.0	427,996	480,814
Europe Magazine	-10.4	10,732	11,976
Astronomy	-10.3	108,584	121,090
Shape Magazine	-10.1	210,350	233,852
Pacific Northwest	-9.4	63,450	70,031
Micro Cornucopia	-9.1	9,296	10,222
D Magazine (Dallas/Ft. Worth)	-9.0	86,645	95,186
Radio-Electronics	-8.4	138,388	151,064
American Legion Auxiliary National News	-8.2	736,321	801,733
Milwaukee Magazine	-8.2	30,398	33,098

In general, subscription sales are much healthier than single copy sales. Even for the 30 magazines with the greatest percentage decreases in subscription circulation, the average drop was 17.6 percent, as compared to a 28.5 percent average decrease in newsstand sales for the 30 titles experiencing the highest single copy losses during the same audit period.

Source: ABC audit figures for six months ended 12/89

Magazines with highest single copy sales

Title	1989 Single Copy Sales	1988 Single Copy Sales	Percent Change
TV Guide	7,226,549	7,475,000	- 3.3
Woman's Day	4,598,000	5,448,442	-15.6
Family Circle	3,838,091	4,376,658	-12.3
National Enquirer	3,663,496	3,830,095	- 4.4
First For Women	3,509,688	3,684,536	- 4.8
Star	3,145,014	3,254,988	- 3.4
Cosmopolitan	2,203,561	2,342,137	- 5.9
People Weekly	1,749,345	1,868,044	- 6.4
Woman's World	1,560,496	1,413,575	+10.4
Penthouse	1,519,390	1,869,415	-18.7
Good Housekeeping	1,511,525	1,613,946	- 6.4
Glamour	1,314,362	1,466,500	-10.4
Globe	1,275,547	1,472,320	-13.4
Ladies' Home Journal	968,112	1,012,152	- 4.4
Reader's Digest	924,334	965,667	- 4.3
Playboy	893,771	864,698	+ 3.4
National Examiner	875,064	1,101,944	-20.6
Weekly World News	814,474	948,630	-14.1
Vogue	761,431	761,834	- 0.1
Redbook	754,047	808,020	- 6.7
Mademoiselle	702,545	931,562	-24.6
Country Living	645,870	689,765	- 6.4
New Woman	643,938	569,582	+13.1
McCall's	600,620	763,132	-21.3
Self	591,607	662,182	-10.7
Life	583,550	556,354	+ 4.9
Better Homes and Gardens	575,833	646,333	-10.9
Elle	509,427	526,700	- 3.3
Seventeen	483,239	469,287	+ 3.0
Muscle & Fitness	468,379	482,375	- 2.9

Of the top 10 single copy leaders, only Woman's World shows an increase—up 10.4 percent—over the same period during the previous year. TV Guide, although still strong on the newsstand, was down 3.3 percent from the year before; Woman's Day and Family Circle lost 15.6 and 12.3 percent, respectively, in single copy sales. And Penthouse, with newsstand sales of more than 1.5 million, shows the biggest percentage decrease of the top 10—down 18.7 percent from the previous audit period. Only five of the 30 magazines with highest 1989 single copy sales had increases on the newsstand over 1988.

Source: ABC audit figures for six months ended 12/89

Magazines with greatest percentage increases in single copy sales

(Based on magazines with single copy sales greater than 3,000 during audit period)

Magazine	% Increase	12/89 Total	12/88 Total
Velonews	149.0	8,215	3,299
Southpoint Magazine	137.6	10,380	4,369
Historic Preservation	90.7	3,748	1,965
Utne Reader	69.0	23,700	14,027
Mother Jones	55.8	23,397	15,021
Off-Road	54.5	50,828	32,897
The Wine Spectator	48.6	16,446	11,068
WOW! Magazine	48.1	135,340	91,402
Bassin'	46.5	42,433	28,967
Organic Gardening	45.1	15,289	10,534
Bop	43.2	248,322	173,371
Texas Fish & Game	42.5	5,419	3,804
Truckin'	39.5	152,376	109,216
American Artist	38.5	27,911	20,158
National Geographic	36.5	87,374	63,992
Flower and Garden Magazine	34.9	15,283	11,333
Southwest Art	29.2	14,685	11,365
WWF Magazine	29.0	252,031	195,415
Mountain Bike	28.2	28,423	22,171
TV Picture Life/Metal Edge	26.5	200,369	158,436
Crafts 'N Things	26.3	113,227	89,653
Deer & Deer Hunting	25.7	68,217	54,262
Savvy Woman	25.7	11,640	9,263
Horseplay	25.4	3,569	2,847
Baltimore Magazine	24.5	9,346	7,507
Popular Electronics	22.9	37,440	30,455
Spy	22.1	66,514	54,467
Computer Shopper	21.6	172,533	141,859
Parenting Magazine	21.6	49,704	40,889
Seattle Weekly	21.6	13,239	10,891

While many large circulation publishers have taken a beating in single copy sales in the last few years, many smaller circulation magazines have prospered on the newsstand, as indicated by the enormous percentage gains for the top six titles above—which increased their single copy sales by more than 50 percent over the last comparable audit period.

Source: ABC audit figures for six months ended 12/89

Magazines with greatest percentage decreases in single copy sales

(Based on magazines with single copy sales greater than 3,000 during audit period)

Magazine	% Decrease	12/89 Total	12/88 Total
Travel-Holiday	-97.3	7,758	281,628
Fishing World	-60.0	3,892	9,733
New England Monthly	-39.0	8,418	13,806
Washington, The Evergreen State Magazine	-37.1	6,686	10,625
BMX Plus!	-35.1	30,732	47,355
Bassmaster Magazine	-34.5	5,217	7,970
Manhattan, Inc.	-32.9	7,997	11,919
Lear's	-32.2	64,500	95,159
Micro Cornucopia	-28.7	8,346	11,700
Harvard Business Review	-26.2	4,952	6,706
Amigaworld	-25.9	38,695	52,184
Colorado Homes & Lifestyles	-25.8	3,999	5,389
Mademoiselle	-24.6	702,545	931,562
Air & Space/Smithsonian	-24.1	13,628	17,958
Cheri	-23.9	139,676	183,513
Tours & Resorts	-23.4	3,346	4,366
Country Home	-22.7	229,667	297,000
Outdoor Life	-22.2	107,038	137,521
AutoWeek	-21.6	3,222	4,110
McCall's	-21.3	600,620	763,132
Cruise Travel	-20.7	6,156	7,767
National Examiner	-20.6	875,064	1,101,944
Newsweek International (Latin America edition)	-19.9	15,202	18,967
Home Mechanix	-19.7	54,875	68,347
Victoria	-19.6	241,708	300,600
Incider	-19.4	20,405	25,327
National Fisherman	-19.2	9,474	11,719
American Health: Fitness of Body and Mind	-18.8	59,303	73,064
The New Republic	-18.7	4,467	5,497
Penthouse	-18.7	1,519,390	1,869,415

The general trend toward increasingly depressed newsstand sales for ABC-audited magazines is evident in the 30 titles with the greatest percentage losses in single copy sales. The average for the above publications is a 28.5 percent decrease in newsstand circulation, with 40 percent of these books losing more than one quarter of their single copy sales compared to the previous audit.

Source: ABC audit figures for six months ended 12/89

continued from page 252

devoted to the non-ABC-audited magazines on the newsstand.

Despite the decline in ABC titles from 91 million copies in 1980 to 80 million in 1989, overall newsstand sales and dollars have experienced record gains, says the report. Sales for the first half of 1989 (the most recent figures available for analysis) rose to $1.8 billion, an 8.9 percent increase over 1988.

A record number of new titles—nearly 500—were published in 1989, says the report. And although many of the larger magazine publishers have suffered unit losses, it adds, special interest titles have emerged to satisfy changing consumer needs. Sales of these magazines, according to PII, have more than compensated for decreases in high-volume title sales.

Comp copies on the rise

Since 1986, there has been a 41 percent increase in the number of circulation directors using comp copies in their direct mail control packages, according to a CCR consumer magazine survey. Sixty-five percent currently use comp copies to attract new subscribers. Sweeps have declined from 10 percent to only 2 percent, and premiums have remained relatively steady over the five-year period—23 percent in 1990 and 27 percent in 1986. Hard offers have shrunk from 17 percent to 10 percent during the same period, after reaching a high of 27 percent in 1987.

Pricing

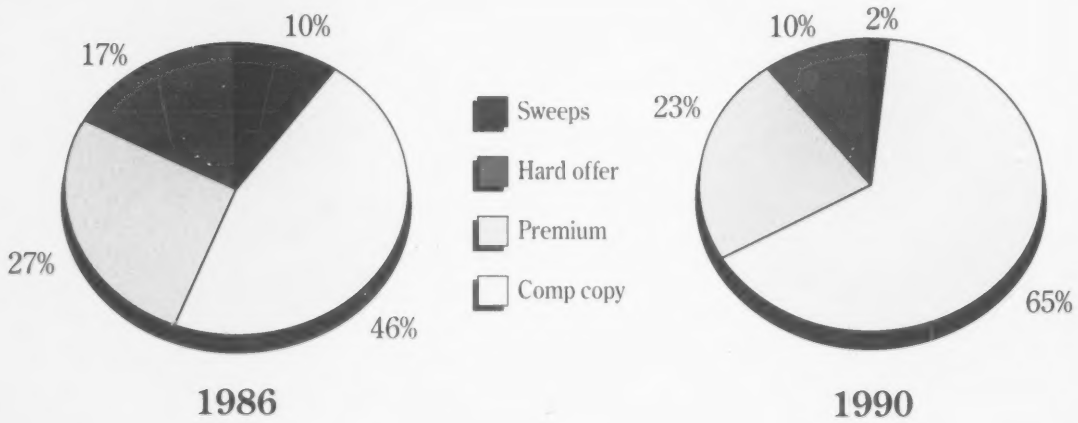
The average newsstand price for monthlies/bimonthlies/quarterlies in 1985 was $2.04. In 1990, it is $2.24, according to Competitive Publishing Hotline. For weeklies/biweeklies, average cover price in 1985 was $1.66, compared to $1.77 in 1990.

The basic subscription price for monthlies/bimonthlies/quarterlies—at $1.51 in 1990—is up from $1.21 in 1985. Weeklies/biweeklies experienced a similar increase in basic sub prices, from $0.79 in 1985 to $0.84 in 1990.

Publishers not raising rate bases

The number of ABC members who missed their rate base in 1989 declined to 24 percent, a new low for the five-year period since 1985. Furthermore, only 15 percent of the respondents to the Capell survey indicated that they had raised their rate bases for 1990, down from 37 percent in the previous year. Sixty percent plan to hold rate bases at their current level. This more conservative philosophy reflects the current trend toward keeping circulation figures as close as possible to rate base promises. ◆

What is your direct mail control offer?



In 1986, comps accounted for less than 50 percent of direct mail control offers, but in 1990 they represent approximately two-thirds of publishers' new subscription efforts, while sweepstakes have declined to only 20 percent of what they were in 1986.

Source: Capell's Circulation Report, Semi-annual Industry Survey

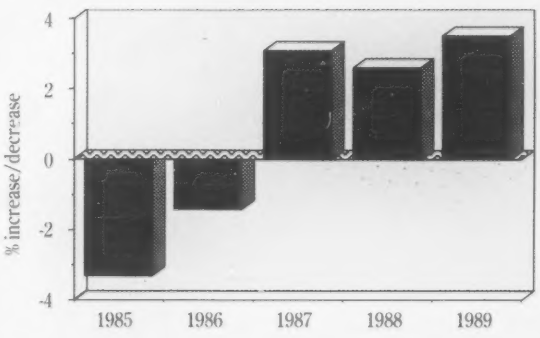
Magazines with highest numbers of ad pages

Magazine	1989 Pages	1988 Pages	% Change
Business Week	4,914.15	4,586.30	+ 7.1
Forbes	3,905.84	3,458.90	+12.9
Fortune	3,775.00	3,236.83	+16.6
People Weekly	3,770.81	3,825.71	- 1.4
Bride's	3,358.86	2,866.50	+17.2
Vogue	3,321.86	3,330.74	- 0.3
TV Guide	3,255.13	3,506.60	- 7.2
New York Magazine	3,094.86	3,052.42	+ 1.4
Sports Illustrated	2,981.90	2,978.01	+ 0.1
Time	2,733.86	2,505.89	+ 9.1
Newsweek	2,495.29	2,478.71	+ 0.7
Modern Bride	2,491.71	2,172.80	+14.7
New Yorker	2,409.51	2,292.09	+ 5.1
Economist	2,355.00	2,340.21	+ 0.6
Cosmopolitan	2,352.25	2,360.66	- 0.4
Elle	2,321.53	2,215.07	+ 4.8
Gentlemen's Quarterly	2,231.04	2,177.55	+ 2.5
U.S. News & World Report	2,053.17	1,873.08	+ 9.6
Family Circle	2,018.81	1,856.37	+ 8.7
Rolling Stone	1,964.79	1,847.71	+ 6.3
Glamour	1,959.53	2,055.83	- 4.7
American Way	1,896.71	1,790.39	+ 5.9
Architectural Digest	1,892.32	1,843.14	+ 2.7
Woman's Day	1,790.38	1,686.00	+ 6.2
Entrepreneur	1,758.47	1,271.43	+38.3
Good Housekeeping	1,702.03	1,620.55	+ 5.0
Town & Country	1,665.58	1,684.47	- 1.1
Yachting	1,657.99	1,712.57	- 3.2
Mademoiselle	1,649.46	1,793.93	- 8.1
Ladies' Home Journal	1,616.16	1,366.09	+18.3
Parents	1,544.02	1,430.54	+ 7.9
W	1,531.03	1,432.65	+ 6.9
Travel & Leisure	1,516.23	1,412.76	+ 7.3
Muscle & Fitness	1,506.50	1,557.96	- 3.3
Sunset	1,503.31	1,586.32	- 5.2
Vanity Fair	1,487.42	1,193.22	+24.7
Harper's Bazaar	1,454.78	1,444.94	+ 0.7
Better Homes and Gardens	1,428.68	1,469.35	- 2.8
Texas Monthly	1,373.67	1,370.34	+ 0.2
Skin Diver	1,362.22	1,381.56	- 1.4
Self	1,347.88	1,244.43	+ 8.3
Golf Digest	1,333.07	1,265.78	+ 5.3
Seventeen	1,331.70	1,393.66	- 4.4

The front-runners in ad pages for 1989 are the same 10 magazines that headed the list in 1988, with some changes in the order of ranking. Most notable are TV Guide's drop from the number three spot in 1988 to seventh position in '89 and People's slip to fourth from second place. Forbes rose from number four to number two; Fortune moved from sixth position to third; and Bride's shifted from ninth place to fifth, thanks to a 17.2 percent increase in ad pages.

Source: Publishers Information Bureau

Five-year analysis of increase/decrease in ad pages



In the past five years, magazine advertising pages have increased 16 percent—from 152,565.73 in 1985 to 177,007.68 in 1989. After decreases for two years, magazines have rebounded to show a steady growth in page totals.

Source: Publishers Information Bureau

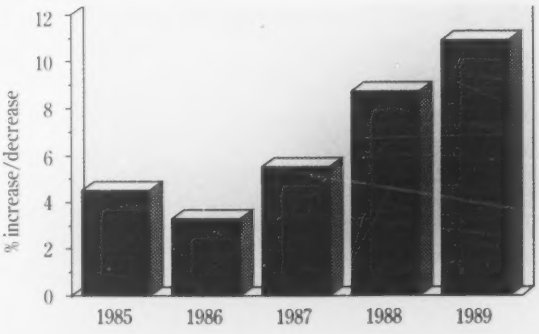
Magazines with highest ad revenue

Magazine	1989 Dollars	% Change
Time	$373,385,017	+ 6.8
Sports Illustrated	336,671,529	+ 4.0
People Weekly	326,203,199	+ 6.8
TV Guide	322,985,623	- 3.7
Business Week	260,575,042	+14.6
Newsweek	255,918,694	+ 5.9
Fortune	167,284,538	+21.7
Forbes	157,696,946	+22.5
U.S. News & World Report	152,843,252	+19.3
Better Homes and Gardens	152,436,109	- 0.2
Family Circle	152,208,684	+13.3
Good Housekeeping	148,033,344	+14.5
Woman's Day	135,632,500	+17.3
Cosmopolitan	125,711,842	+ 9.7
Reader's Digest	113,644,537	- 0.3
Ladies' Home Journal	104,742,667	+25.0
Vogue	101,001,807	+15.4
Glamour	88,833,183	+ 2.1
Money	79,668,320	- 0.1
Redbook	75,031,696	+ 9.4
McCall's	74,798,588	+19.5
Rolling Stone	71,093,073	+14.5
Golf Digest	63,995,011	+15.8
Elle	62,648,418	+13.0
Southern Living	61,224,697	- 0.7
Parents	60,344,516	+13.6
Life	56,846,163	+16.7
Bride's	55,280,547	+26.3
Car and Driver	54,303,468	+20.9
New Yorker	54,033,158	+13.0
Travel & Leisure	53,342,754	+19.2
Gentlemen's Quarterly	49,899,443	+13.2
Mademoiselle	48,697,898	+ 0.1
Modern Maturity	47,455,205	+18.8
New York Magazine	47,430,625	+ 7.4
Inc.	46,642,250	+10.5
Playboy	46,503,864	+14.4
Architectural Digest	46,049,915	+ 9.2
Sunset	44,372,483	- 4.2
Smithsonian	43,766,044	+ 5.7
Country Living	42,604,158	+14.2
Self	42,326,178	+21.8
Vanity Fair	41,616,840	+51.1
Field & Stream	39,941,583	+ 8.3
Seventeen	39,590,128	+ 2.4
Modern Bride	38,456,726	+24.0
Esquire	38,016,280	+21.3

Of the top 10 highest revenue producers, only two magazines showed losses in ad dollars from 1988: TV Guide was down from $335,407,992, a decrease of 3.7 percent, and Better Homes and Gardens experienced a .2 percent drop from 1988 revenue of $152,806,437. Forbes and Fortune showed the biggest percentage increases in advertising revenue, up 22.5 and 21.7 percent, respectively. Time held its number one position as the leader in ad dollars, with a 6.8 percent increase over its 1988 total of $349,742,381.

Source: Publishers Information Bureau

Five-year comparison of increase/decrease in ad revenue



Magazines have experienced healthy jumps in ad revenue since 1985, despite overall losses in ad page totals in 1985 and 1986. Total ad revenue in 1989 easily broke the $6 billion mark at $6,642,059,977, almost 11 percent above the 1988 figure of $5,989,506,509.

Source: Publishers Information Bureau

Magazine advertising revenue by class totals

Classification	Advertising Revenue		
	Jan-Dec 1989	Jan-Dec 1988	% Change
Automotive, Automotive Accessories	$882,999,850	$800,269,924	+10.3
Toiletries & Cosmetics	650,710,759	576,566,606	+12.9
Business & Consumer Services	529,335,303	470,186,249	+12.6
Direct Response Companies	518,772,163	466,987,424	+11.1
Food & Food Products	435,345,476	376,942,996	+15.5
Cigarettes, Tobacco & Accessories	401,569,812	354,449,143	+13.3
Apparel, Footwear & Accessories	395,094,003	357,312,990	+10.6
Travel, Hotels & Resorts	374,524,268	321,757,509	+16.4
Computers, Office Equipment & Stationery	288,421,338	249,245,085	+15.7
Beer, Wine & Liquor	256,764,679	215,616,687	+19.1
Retail	209,005,060	182,435,883	+14.6
Publishing & Media	193,709,717	192,696,599	+ 0.5
Jewelry, Optical Goods & Cameras	153,872,515	138,377,742	+11.2
Drugs & Remedies	137,335,662	146,514,280	- 6.3
Insurance & Real Estate	134,356,132	129,172,903	+ 4.0
Sporting Goods, Toys & Games	133,643,684	121,270,852	+10.2
Household Furnishings, Supplies & Materials	125,129,150	116,904,622	+ 7.1
Household Equipment & Supplies	103,045,763	101,725,527	+ 1.3
Electronic Entertainment Equipment & Supplies	102,774,190	90,516,130	+13.5
Building Materials, Equipment & Fixtures	82,842,596	89,463,223	- 7.4
Miscellaneous Not Itemized	77,002,335	92,969,478	-17.2
Soaps, Cleansers & Polishes	67,728,543	50,956,982	+32.9
Miscellaneous Not Elsewhere Classified	64,720,713	63,925,802	+ 1.2
Industrial Materials	63,162,698	54,224,983	+16.5
Confectionery, Snacks & Soft Drinks	53,413,058	51,931,770	+ 2.9
Freight, Industrial & Agricultural Development	47,936,606	41,233,149	+16.3
Pets, Pet Foods, Supplies & Organizations	45,843,205	31,162,286	+47.1
Gasoline, Lubricants & Fuels	27,574,252	22,633,461	+22.8
Entertainment & Amusement	26,308,275	31,076,342	-15.3
Horticulture & Farming	24,791,953	24,048,749	+ 3.1
Business Propositions & Employment Recruitment	22,425,953	18,827,017	+19.1
Airplanes, Aviation Accessories & Equipment	14,006,428	12,463,437	+12.4
TOTALS:	$6,644,173,739	$5,993,865,830	+10.9

Advertising revenue for 1989 was over $6.5 billion, up more than $650 million from 1988. The most dramatic percentage increases were in the Pets, Pet Foods, Supplies & Organizations and Soaps, Cleansers & Polishes classifications, followed by Gasoline, Lubricants & Fuels; Beer, Wine & Liquor; and Business Propositions & Employment Recruitment. The Automotive/Accessories classification was the leader in ad revenue once again, posting nearly an $83 million gain over 1988.

Source: Magazine Publishers of America, based on Publishers Information Bureau data